



Missouri Travel Barometer
July 2014 Report
(Data available as of 8/14/14)

The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry with a monthly *Missouri Travel Barometer*. The main goal of this report is to answer the question, “How is tourism doing statewide?” Updated monthly, the barometer shows key travel indicators that - at a glance - illustrate various measurements that affect Missouri’s tourism industry and are indicators of its health.

July Report Highlights

Lodging Statistics: 2014 Calendar Year to Date through June

According to Smith Travel Research, Missouri’s statewide lodging demand, occupancy and revenue have shown positive growth compared to the same time period last year. When compared to our surrounding, competitive states, Missouri has shown strong growth in occupancy and RevPAR while other states are showing strong growth in ADR and demand.

Missouri Lodging:

Demand up 5.2% -- Occupancy up 5.7% -- ADR up 4.6% -- RevPAR up 10.6%

SIC Tourism business sales and tax collections: 2014 Calendar Year to Date through May

- A 4.3% increase (\$189.8 million) in sales revenue is indicated from preliminary reports on tourism’s 17 SICs for January through May 2014 over the same period in 2013.

Website Visits: 2014 Calendar Year to Date through July

- Total web visits (main site and mobile visits) were up 25.4% for July CYTD compared to the same period in 2013
- Total web visits (main site and mobile visits) were up 23.5% for June 2014 compared to June 2013.

Responses to MDT advertising (requests for travel guide via phone, website, email, etc. or sign up for a newsletter that is emailed based on travel interests): 2014 Calendar Year to Date through July

- 74,294 for 2014 CYTD – an decrease of 38.5% due to an one time addition of 61K Conservationist leads in April 2013
- For the month of July only compared to last July, there was a 32% decrease

Welcome Center visits: 2014 Calendar Year to date through July

- On direct comparison for CY 2014 the centers are down 5.7% for July CYTD compared to the same period in 2013.
- With the new Conway centers added for 2014 only, centers are up 15.8% (Conway counts N/A for 2013).

All commercial airport deplanements: 2014 Calendar Year to Date

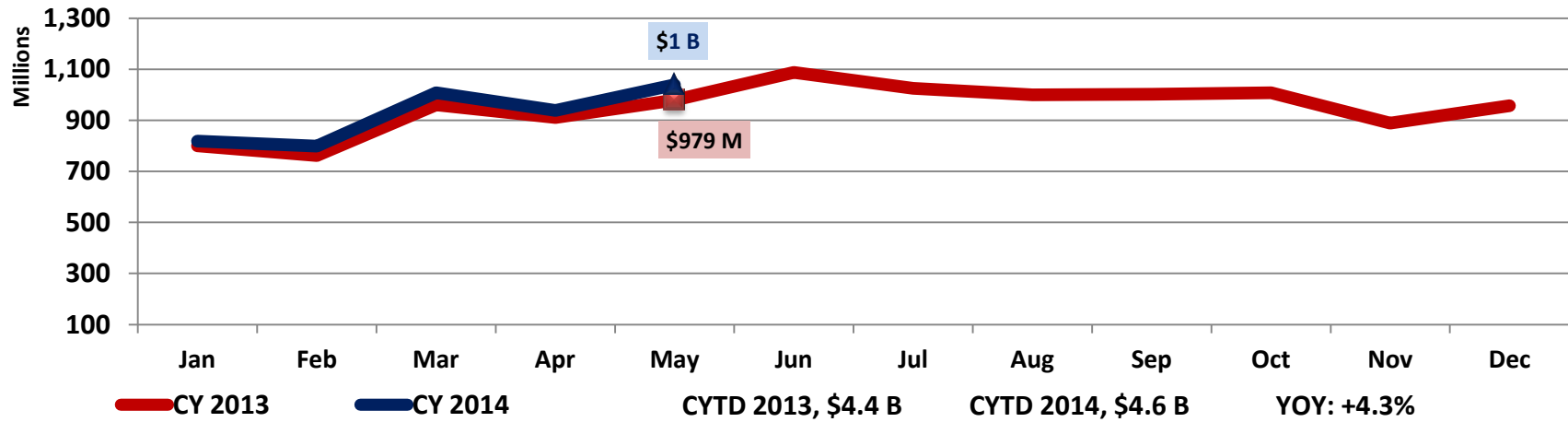
- KC up 2.5% for Jan-June 2014 CYTD
- St. Louis down 3.5% for Jan-June 2014 CYTD
- All others up 9.3% for Jan-May 2014 CYTD compared to Jan-May 2013

Online search and booking trends: July – August 2014

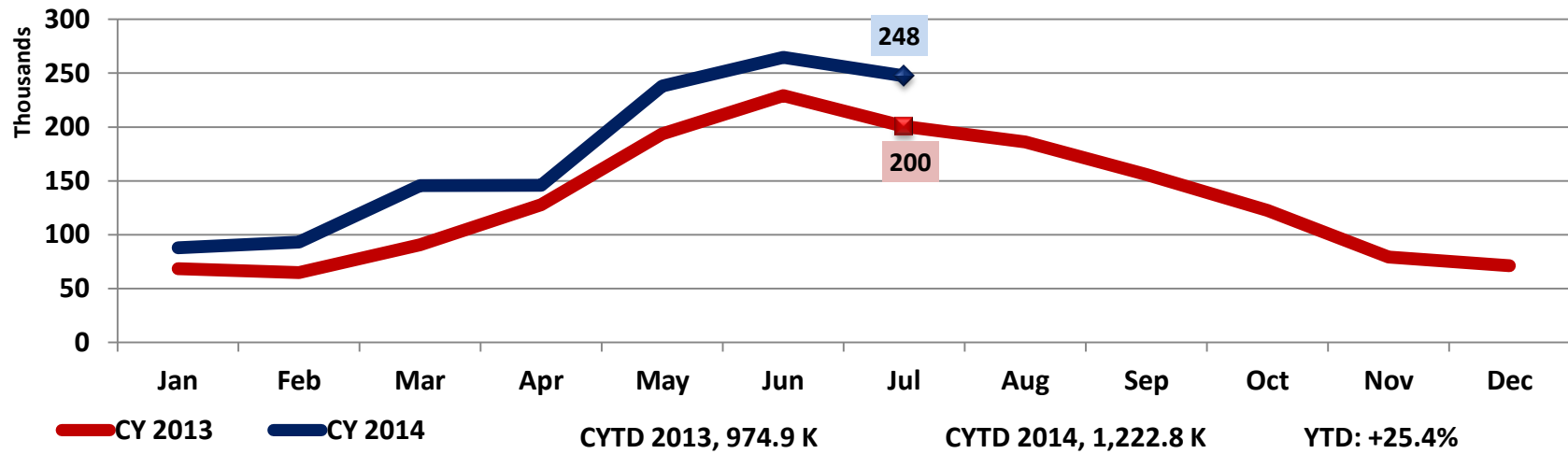
- Demand for travel to Missouri across third-party sites is up 15.25% for July (MOM) with the top Converting Markets (outside of MO) as New York, Chicago, Los Angeles, Dallas and Denver.
- Top converting demographic at 15% is the *Adventure Seeker*, the higher spending traveler looking for an authentic, active experience, who has a 75-day search-to-stay lead time for travel.
- The *Go for It Family* demographic shows opportunity for August because it has a substantially shorter book-to-stay window for Missouri than rival Tennessee. Once they book, they are in-market within the month.

Sources: MO Dept of Revenue, Google Analytics, MDT databases, Federal Bureau of Transportation, STR, Inc., and nSight

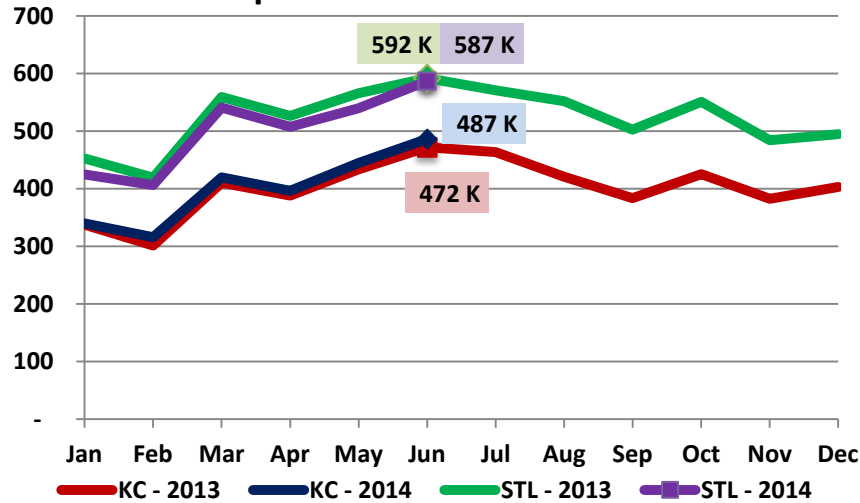
Sales Revenue from 17 Tourism SICs



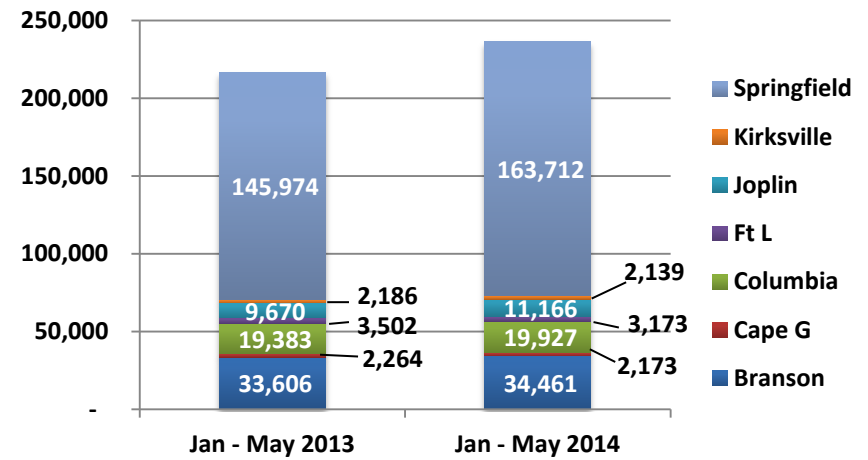
Total Web Visits



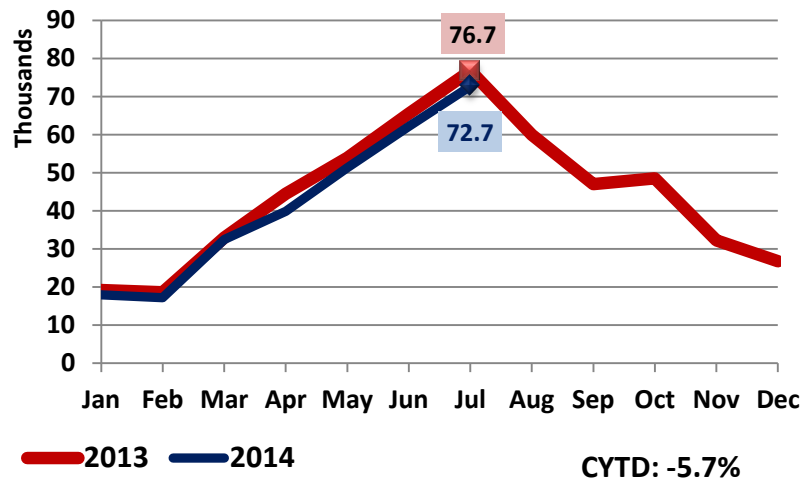
Deplanements - KC & StL



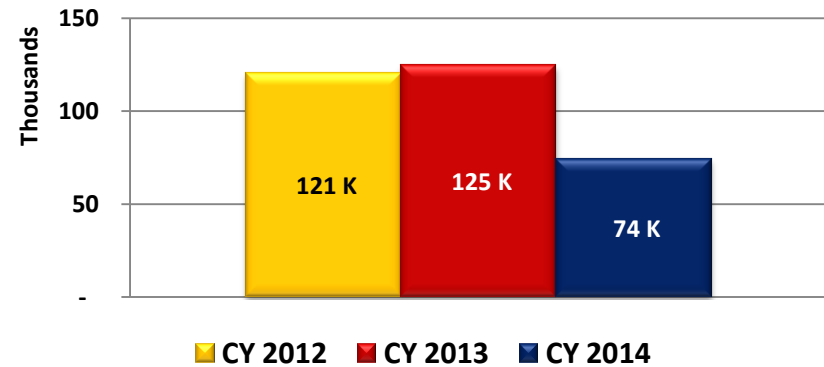
Deplanements - All Other Airports



Welcome Center Visitors



CYTD Responses thru July



Responses are requests for information including calls, web orders, RSL, mail, & lead generation programs.